

White Ember Financial Planning is a growing wealth management firm, is seeking a Director of First Impressions to assist us in our mission of helping clients achieve their financial goals. This is your chance to play a key role in the future success of our fast-growing organization!

Become a member of one of the most respected teams in the wealth management industry. White Ember was recently named Forbes Top Next-Gen Wealth Advisors.

### **Job Description**

The Director of First Impressions plays an important role in setting the tone for the organization. As the first and last person clients see when they are in the office, the Director of First Impressions is instrumental in making sure clients have a positive experience.

### **Responsibilities**

- Greets clients and prospective clients in a friendly and sincere manner, making them feel comfortable when they visit the office.
- Handles incoming telephone calls.
- Sorts and distributes the mail.
- Sends periodic client correspondence.
- Coordinates the assembly and mailing of client paperwork.
- Handles calendars for the Financial Advisor(s) and others in the office.
- Orders and handles office supplies.
- Coordinates outside vendors.
- Develops, mails, and analyzes client satisfaction surveys.
- Develops and maintains written documentation (systems) of all activities.
- Performs other duties as assigned.

### **Desired Skills and Experience**

- Excellent interpersonal skills.
- Excellent attitude and an extraordinary client service orientation.
- Superior phone skills—friendly and helpful in all interactions on the phone.
- A genuine interest in serving and caring for other people.
- Excellent organizational and time management skills and ability to multi-task.
- Professional demeanor.
- Proficiency with Microsoft Office Suite.
- Ability to type quickly.
- Attendance is an essential function.
- Previous office Administration or Human Resource experience, helpful.

## Salary and Benefits

- Competitive Salary based on experience and credentials, 401k, paid holidays and bonus opportunities.

## How to Apply

Please send your resume and letter of interest to [info@whiteember.com](mailto:info@whiteember.com). Please spend time researching our firm by visiting our website, watching our videos and reading our blog. If White Ember and this position sound interesting to you, please include in your letter:

- Why you are a good fit for our brand, culture, Team and position
- How you can contribute to the above
- Examples of anything that highlights you or your work – any and all mediums are acceptable

We will review your credentials and will respond with more detail about this opportunity. You should anticipate multiple rounds of interviewing with members of the Team. We are concerned about getting the right people on our team so our hiring process has several steps.

## Here's What You Need to Know About White Ember Financial Planning

White Ember Financial Planning is an advisory firm based in Nevada, Missouri, founded over 30 years ago. Dedicated to serving families, business owners, executives and institutions the firm provides the highest level of service for our local and national clients in financial planning and investment management.

For more information about our company, please visit our website [www.whiteember.com](http://www.whiteember.com)